Saskatchewan
Tourism and
Small Business

TRAVEL MARKETS FOR SASKATCHEWAN'S TOURISM INDUSTRY

MONTANA REPORT

June, 1985

Prepared by:

Business Information & Research Branch
Saskatchewan Tourism & Small Business

TABLE OF CONTENTS

		Page
EXECUTIVE SUMMARY		1
1.0	**Existing Out-of-State Travel Profile of Montana Residents**	
1.1	Market Size	2
1.2	Market Characteristics	2
1.2.1	Trip Purpose	2
1.2.2	Activities Pursued on Pleasure Trips	3
1.2.3	Trip Frequency	5
1.2.4	Transportation Modes for Pleasure Travel	6
1.2.5	Accommodation Used on Pleasure Trips	7
1.2.6	Trip Planning Behaviour by Montana Residents	7
2.0	**Performance of the Saskatchewan Tourism Industry in the Montana Marketplace**	10
2.1	Saskatchewan's Market Share of Montana's Out-of-State Travellers	10
2.2	Primary Travel Motivators in the Montana Market	10
2.3	Motivators for Pleasure Travel to Saskatchewan by Montana Residents	11
2.4	Length of Stay by Montana Visitors to Saskatchewan	14
2.5	Type of Accommodation Used by Montana Residents on Trips to Saskatchewan	14
2.6	Mode of Travel Used by Montana Residents When Travelling to Saskatchewan	15
2.7	Party Size Characteristics of Montana Residents Travelling to Saskatchewan	15
2.8	Travel Market Image of Saskatchewan as Held by Montana Residents	16
3.0	**Potential Market for Travel to Saskatchewan**	21
3.1	Long-Term Outlook for Growth in Montana's Travel Markets	21
3.2	Forecast of Potential Travel Market for Saskatchewan from Montana to 1987	21
3.3	Reasons for Likelihood of Montana Residents to Visit Saskatchewan	22
3.4	Factors Most Likely to Influence Travel by Montana Residents to Saskatchewan	24
3.5	Potential Size of Markets for Specific Activities	24
3.6	Characteristics of Montana Visitors	26

TABLE OF CONTENTS (cont'd)

		Page
4.0	**Considerations and Implications for Marketing and Promotional Strategies**	27
	4.1 Improvements Required to Saskatchewan's Market Image in Montana	27
	4.2 Existing Awareness of Specific Attractions	28
	4.3 Promotional Media for Encouraging Travel to Saskatchewan by Montana Residents	29
	4.4 Timing and Promotional Activities	33
5.0	**Conclusions**	34
Appendix A - Methodology		35

EXECUTIVE SUMMARY

This report describes a number of characteristics typical of the Montana out-of-state travel market and examines Saskatchewan's performance in this market in terms of market share and market image.

Saskatchewan captures about 2.8% of the out-of-state travel by Montana residents.

This study observes that Montana residents are interested in a broad range of pleasure travel activities such as rural and urban sightseeing, visiting historic sites/museums, attending festivals/events, camping, fishing, hiking, wilderness canoeing and other activities. Many of these activities could be pursued in Saskatchewan.

Montana residents tend to primarily visit Saskatchewan for purposes of rural/urban sightseeing, camping, and sporting events. Saskatchewan's image in the Montana marketplace is not well-defined.

1.0 EXISTING OUT-OF-STATE TRAVEL PROFILE OF MONTANA RESIDENTS

1.1 Market Size

The Montana market generates approximately 2,165,000 out-of-state trips annually to other destinations. Thorne, Stevenson & Kellogg estimate that Saskatchewan's share of the out-of-state market from Montana at about 2.8% or 60,600 person-trips.

1.2 Market Characteristics

1.2.1 Trip Purpose

Travellers from the Montana area are largely vacation travellers. The most preferred activity appears to be sightseeing. For one-third of travellers from the Montana area to destinations outside the country, sightseeing is the major purpose of trip. The next most important purpose of trip is VFR (19%), followed by entertainment (16%) and outdoor recreation (13%).

NOTE: Montana area includes Montana, the Dakotas and Wyoming.

TABLE 1

Main Reason for Trips by Montana,
North Dakota and Minnesota Residents, 1980-83

Trip Purpose	Montana	North Dakota	Minnesota
Pleasure	49%	49%	60%
Visiting Friends/Relatives	47%	41%	35%
Both Business and Pleasure	22%	22%	19%
Business	3%	2%	2%
Other	1%	2%	-

Source: Mid-Continent Research, Inc. study of the Montana market.

NOTE: Percentages may not add to 100% due to rounding or to multiple responses.

1.2.2 Activities Pursued on Pleasure Trips

Table 2 shows the relative popularity of 19 major activities often pursued by tourists of Montana, North Dakota and Minnesota on pleasure trips. Of all the pleasure activities listed, the five most popular with Montana travellers include rural sightseeing, historical sites/museums, urban sightseeing, festivals or special events and musical events or live theatre.

TABLE 2

Specific Interest of Montana, North Dakota and Minnesota Travellers on Pleasure Trips

Trip Purpose	All State[1] Average	Montana	North Dakota	Minnesota
Rural Sightseeing	79%	79%	79%	80%
Historical Sites/Museums	85%	88%	88%	80%
Urban Sightseeing	75%	73%	78%	75%
Festivals/Special Events	62%	56%	60%	69%
Musical Events/Live Theatre	56%	54%	61%	52%
Craft/Art Fairs	42%	40%	43%	42%
Camping	54%	64%	51%	48%
Water Sports	40%	42%	41%	38%
Sporting Events	47%	52%	45%	45%
Hiking	36%	39%	27%	41%
Fishing	48%	55%	46%	43%
Industrial Tours	24%	21%	30%	21%
Downhill Skiing	24%	29%	21%	22%
Sailing	12%	10%	11%	15%
Wilderness Canoeing	16%	16%	12%	19%
Cross-Country Skiing	15%	16%	9%	19%
Snowmobiling	17%	19%	17%	19%
Hunting Game Bird	21%	20%	22%	20%
Hunting Big Game	22%	31%	19%	17%

[1]Average for all three states.

1.2.3 Trip Frequency

The majority of Montana residents undertake one pleasure trip annually of four or more nights duration

TABLE 3

Percentage Distribution of the Number of Annual Pleasure Trips of Four or More Nights Duration by Residents of Montana, North Dakota, and Minnesota

Number of Pleasure Trips of 4+ Nights	All State[1] Average	Montana	North Dakota	Minnesota
0	8%	7%	8%	9%
1	41%	40%	44%	40%
2	26%	25%	27%	26%
3	10%	11%	9%	11%
4	6%	7%	6%	5%
5 of more	9%	10%	7%	9%

[1]Average for all three states.

1.2.4 Transportation Modes for Pleasure Travel

Montana travellers for long distance trips prefer using the automobile when on a pleasure trip.

TABLE 4

Modes of Transportation Used by Montana, North Dakota and Minnesota Residents on Long Distance Out-of-State Pleasure Trips

Transportation Mode	All State[1] Average	Montana	North Dakota	Minnesota
Automobile	51%	57%	53%	43%
Airplane	43%	37%	37%	54%
Train	2%	4%	3%	-
Bus	4%	5%	4%	3%
Van/RV/Camper	4%	5%	4%	4%
Other	2%	3%	2%	2%

[1]Average for all three states.

NOTE: Percentages may not add up to 100% due to more than one mode of transportation used.

1.2.5 Accommodation Used on Pleasure Trips

Table 5 displays the type of accommodation used by Montana travellers when on pleasure trips. Homes of friends/relatives are the dominant type of accommodation (50%) used by Montana travellers.

Montana travellers are typically more likely to stay with friends and relatives as compared to Minnesota or North Dakota travellers.

TABLE 5

Accommodation Used by Montana, North Dakota and Minnesota Travellers on Pleasure Trips

Type of Accommodation	All State[1] Average	Montana	North Dakota	Minnesota
Hotels/Motels	43%	40%	42%	47%
Friends/Relatives	45%	50%	48%	38%
Camping	10%	10%	10%	11%
Resorts	3%	2%	4%	4%
Other	6%	4%	4%	9%

[1]Average for all three states.

1.2.6 Trip Planning Behaviour by Montana Residents

The main months in which Montana residents start planning their summer pleasure trips are January, March and May. However, June is the primary month in which Montana travellers decide on their destination. Table 6 further illustrates when summer trips are planned and when a decision on destination is made.

It is interesting to note that 35% of Montana travellers do not plan on taking a summer pleasure trip.

TABLE 6

Summer Trip Planning and Trip Destination Decision by Montana Residents

Month	Month When Summer Trip is Planned	Month	Month When Destination is Decided for Summer Trip
January	10%	January	2%
February	6%	February	-
March	10%	March	5%
April	5%	April	8%
May	9%	May	9%
June	8%	June	15%
July	2%	July	6%
August	2%	August	3%
September	2%	September	-
October	-	October	1%
November	1%	November	-
December	-	December	-
Don't Know	9%	Don't Know	15%
Do Not Take Summer Pleasure Trip	35%	Do Not Take Summer Pleasure Trip	35%

The pattern of who makes decisions about a vacation destination in Montana are somewhat different to the patterns found in Minnesota or North Dakota. The husband and wife jointly decide in 43% of the households, the whole family deciding in about 15% of the households, the male head deciding in 11%, and the female head in 12% of the households.

Table 7 shows that Montana residents have a tendency to use travel agents to plan vacations.

For those who use travel agents, convenience and arrangements for air tickets and hotel reservations were the primary reasons for using travel agents.

TABLE 7

Use of Travel Agents and Packaged Tours
by Montana Travellers

Use of Travel Agents in Past 3 Years to Plan/Arrange Pleasure Trips

Yes = 40% No = 60%

Reasons Why:

Convenience	18%
Information/Guidance	3%
Cheap Trip	5%
Know Agent	2%
Air Ticket and Hotel Reservation	8%
Other/Not Sure	7%
Did Not Use Travel Agent	60%

Use of Package Tours in Past 3 Years

Yes = 7% No/No Answer = 93%

Reasons Why:

More Economical	3%
Convenience	1%
Pre-Arranged	-
Group Tour	2%
Other/Not Sure	1%
Did Not Use Package	93%

2.0 PERFORMANCE OF THE SASKATCHEWAN TOURISM INDUSTRY IN THE MONTANA MARKETPLACE

2.1 Saskatchewan's Market Share of Montana Out-of-State Travellers

According to Thorne, Stevenson & Kellogg estimates, Montana residents undertook 2,165,000 out-of-state person-trips to other destinations. Saskatchewan captured 60,600 person-trips or 2.8% market share.

2.2 Primary Travel Motivators in the Montana Market

Sightseeing was typically the single most common motivator associated with travel by Montana residents on the last pleasure trip to Canada. Other popular travel motivators include visiting friends/ relatives, attending sports events and hunting or fishing. The trip motivators are outlined in Table 8.

TABLE 8

Selected Travel Motivators/Activities of Montana Travellers to Canadian Destinations

Motivators/Activities	Ontario Travellers
Visiting Friends/Relatives	12%
Shopping	1%
Sightseeing	57%
Boating/Camping	3%
Special Events	2%
Attend Sports Events/Festivals	7%
Hunting or Fishing	6%
Other	19%

Source: Mid-Continent Research Inc., Vacation Habits of Travellers in Ontario, Montana, North Dakota and Minnesota.

NOTE: Percentages may not add to 100% since more than one travel motivator/activity is required to induce travel.

2.3 Motivators for Pleasure Trips to Saskatchewan by Montana Residents

Table 9 shows the activities which comprised the main travel purposes of Montana residents travelling to Saskatchewan on their most recent pleasure trip. The main activities which are pursued in Saskatchewan by Montana residents include primarily rural and urban sightseeing, camping and attending sporting events.

Saskatchewan tends to attract the sightseeing pleasure traveller from Montana. Table 10 further illustrates what activities Montana residents look for on a pleasure trip relative to the activities they undertake in Saskatchewan. As Table 10 shows, although Montana travellers rank urban sightseeing, visiting historic sites, attending festivals/events, etc., high on their preferred activities, while in Saskatchewan their participation is low in the activities they enjoy doing. Their main activity in Saskatchewan is rural sightseeing.

TABLE 9

Main Purpose or Activity Pursued on Last Pleasure Trip to Saskatchewan

Purpose	All State[1] Average	Montana	North Dakota	Minnesota
Rural Sightseeing	41%	50%	39%	34%
Historical Sites	2%	6%	-	-
Urban Sightseeing	25%	22%	25%	27%
Festivals	6%	6%	11%	-
Camping	14%	11%	11%	20%
Water Sports	2%	6%	-	-
Sporting Events	4%	11%	-	-
Musical Events	1%	-	4%	-
Fishing	17%	6%	25%	19%
Hiking	5%	-	-	15%
Craft/Art Fairs	2%	6%	-	-
Downhill Skiing	-	-	-	-
Industrial Tours	-	-	-	-
Cross-Country Skiing	-	-	-	-
Sailing	-	-	-	-
Snowmobiling	-	-	-	-
Wilderness Canoeing	3%	-	-	8%
Big Game Hunting	4%	6%	-	6%
Game Bird Hunting	2%	-	-	6%

[1]Average for all three states.

TABLE 10

Comparison of Activities Sought on a Pleasure Trip by
Montana Residents and Their Activity Participation in Saskatchewan

Activities Sought by Montana Residents on a Pleasure Trip		Montana Visitors Who Participate in Saskatchewan in These Activities
Rural Sigthseeing	77%	50%
Historical Sites/Museums	88%	6%
Urban Sightseeing	73%	22%
Festivals/Events	56%	6%
Musical Events	54%	-
Craft and Art Fairs	40%	6%
Camping	64%	11%
Water Sports	42%	6%
Sporting Events	52%	11%
Hiking	39%	-
Fishing	55%	6%
Industrial Tours	21%	-
Downhill Skiing	29%	-
Sailing	10%	-
Wilderness Canoeing	16%	-
Cross-Country Skiing	16%	-
Snowmobiling	19%	-
Game Bird Hunting	20%	-
Big Game Hunting	31%	6%

2.4 Length of Stay by Montana Visitors to Saskatchewan

Table 3 shows that 40% of Montana pleasure travellers normally take at least one pleasure trip lasting four or more nights away from home to other destinations. Table 11 shows that of all Montana travellers taking trips to Saskatchewan, 17% stayed at least four nights on their last pleasure trip to Saskatchewan.

TABLE 11

Percent of Trips Taken by Montana Travellers
Lasting at Least Four or More Nights Away from Home

Length of Trip	To Saskatchewan
Three Nights or Less	83%
Four or More Nights	17%

Montana residents on their last pleasure trip to Saskatchewan, tended to spend fewer four or more nights duration trips in Saskatchewan than did residents of North Dakota and Minnesota.

2.5 Type of Accommodation Used by Montana Residents on Trips to Saskatchewan

In general, Montana tourists tend to stay more often in hotels/motels when travelling in Canada and Saskatchewan.

TABLE 12

Type of Accommodation Used by Montana Travellers
in Canada and in Saskatchewan

Accommodation	Canadian Destination	Saskatchewan
Hotels/Motels	60%	67%
Friends/Relatives	10%	11%
Camping	24%	17%
Resorts	6%	11%
Other	-	-
Passed-Through	3%	-

In the case of travel to Saskatchewan, Montana residents tend to stay more in hotels/motels and less in campgrounds.

2.6 Mode of Travel Used by Montana Residents When Travelling to Saskatchewan

Table 4 noted that Montana residents display a significantly greater tendency to use the automobile when travelling on long distance pleasure trips.

Trips taken to Saskatchewan by Montana residents are all by automobile while to Canada the automobile accounts for 79% of trips.

TABLE 13

Modes of Transport Used by Montana Pleasure Travellers on Out-of-State Trips in Canada and to Saskatchewan

Transport Mode	Trips in Canada	Trips to Saskatchewan
Automobile	79%	100%
Airplane	6%	-
Train	1%	-
Bus	7%	-
Van/RV/Camper	6%	-
Other	6%	-

2.7 Party Size Characteristics of Montana Residents Travelling to Saskatchewan

From Montana, the average party size was 3.7 people to Saskatchewan.

TABLE 14

Party Size of Montana Pleasure Travellers to Saskatchewan

Party Size	Percent
1	-
2	39
3	6
4	28
5	-
6 or more	28
Average	**3.7**

TABLE 15

Comparison of Party Size for Montana,
North Dakota and Minnesota

State	Average Party Size
Montana	3.7
North Dakota	3.9
Minnesota	4.1

2.8 Travel Market Image of Saskatchewan as Held by Montana Residents

Approximately 34% of Montana residents gave Saskatchewan a positive rating. This compares to the positive image which was given to Saskatchewan, by residents of Minnesota.

A major barrier in the Montana market for Saskatchewan is that 44% of Montana residents stated "don't know anything about it/have no idea what it's like."

Montana residents tend to view Saskatchewan positively in terms of scenery. The most negative perception held about Saskatchewan was that it is very flat and uninteresting with no pretty scenery.

When asked to describe Saskatchewan as a place for pleasure or business travel, 50% of Montana residents gave it a favourable rating, 10% an unfavourable rating, while 41% "did not know anything about Saskatchewan".

Table 16 and Table 17 provide a detailed breakdown of Montana residents image or perception of Saskatchewan.

TABLE 16

Perceptions Held of Saskatchewan by Montana Residents - If Asked by a Friend

Favourable Mentions	34%
° Just wilderness I suppose/Full of prairies and open space/ Prairies and flat country like Montana/North Dakota	2%
° Nice place to go/Great place to spend a week/Been there and would recommend going there/You should visit there, check it out/A nice place to visit	10%
° I heard it's beautiful/I think it is real pretty in the summer/It has a lot of scenery/Very scenic/It is a very pretty place/The scenery is beautiful	9%
° There's farming there/Good farm land/Agricultural area/It's grain country/Grow a lot of wheat	3%
° I'd love to go there/I'd like to go there/I would like to see it	5%
° Good fishing/Good hunting/Good fishing and hunting	4%
° Friendly people/The people are hospitable/Friendly/Nice people	6%
° Have relatives there/Was born there/Own property there/ Have friends there	1%
° Regina is a very interesting place to visit/Regina is worth a visit/I liked Regina/Regina is a nice city	1%
° Mentioned a specific thing to see/Place to see/Thing to do	1%
° Lots of things to do there/Lots to see/Lots of shops	2%
° Good lakes/Nice lakes/Lot of lakes/Big lakes/Cold clear lakes	1%
° Other favourable mentions	6%
Unfavourable Mentions	6%
° It's not really very scenic/Very flat and uninteresting/No pretty scenery	4%
° Very cold in the winter/It's cold/Don't like the cold weather	-
° Other unfavourable mentions	2%
° I have never been there	18%
° Don't know anything about it/Have no idea what it's like	44%
° Never heard of Saskatchewan	-

TABLE 17

Perceptions of Saskatchewan as a Place for Pleasure or Business Travel by Montana Residents

Favourable Mentions	50%
° I understand that Saskatchewan is a beautiful place to travel - lots of scenery/The scenery is very pretty/Very nice countryside/The pretty scenery/Beautiful like the rest of Canada	20%
° Fine for pleasure/It would be a pleasure to go there/I'd like to go there/For pleasure, it's great/Good place to get away from it all/ Definitely a relaxing place to go	5%
° Nice place/Hear it's a nice place to go/Friends and relatives like it/ Sounds like a nice place	16%
° For the sportsman it is great/It's probably good duck hunting/It's good hunting territory/Probably outdoorsy/Good fishing and hunting	5%
° Should be suitable for business/Very good place for business	-
° Plenty of things to see/Good for sightseeing/Interesting place to visit/ Interesting to go there	3%
° Nice people there/People are friendly/Hospitable	8%
° Farm country/Lots of wheat fields/It's got a lot of farm land	2%
° Seen advertisements/On TV looks like a nice place to visit/Recall some advertisements for there	-
° Clean/Clean - no litter/Clean and tidy countryside	3%
° Lakes/Nice lakes/Have lots of lakes	3%
° I think of the wilderness/It is fairly wilderness yet - we like the wilderness and camping	-
° Other favourable mentions	11%
° It's okay/All right/It's average/Can't be too bad/Sounds okay	3%
Unfavourable Mentions	10%
° No attraction for me to go there - not too much to do/Not my kind of place/Nothing there I like to do or see	1%
° I wouldn't go there/Not interested/Not a place I would want to be (no reason given)	1%
° Flat/Just prairies	1%
° Don't like the scenery/Not pretty scenery there	1%

TABLE 17 (cont'd)

Unfavourable Mentions

° Prefer somewhere else/like Alberta better/Minnesota is better/ It's not number one on my list	2%
° Other unfavourable mentions	4%
° Don't know/Don't know anything about it	41%

When those Montana residents who had travelled on a pleasure trip to Saskatchewan were asked to describe what they liked best about the province, "scenery" and "nice/friendly people" and a specific place or event were the most often mentioned as is outlined in Table 18. When they were asked what they liked the least about their pleasure trip to Saskatchewan, "weather", "flat countryside", and "high costs" were most frequently mentioned factors as noted in Table 19.

TABLE 18

Positive Impressions of Saskatchewan Held by Montana Residents Based on Most Recent Trip to Saskatchewan

Aspects Liked Best	Percent
Liked Everything	39
The Scenery	39
Nice/Friendly People	33
Specific Place or Event	28
Visiting Friends/Relatives	11
Good Fishing	11
Clean Cities	11
Good Hunting	6

TABLE 19

Negative Impressions of Saskatchewan Held by Montana Residents Based on Most Recent Trip to Saskatchewan

Aspects Liked Least	Percent
Nothing Liked	-
Flat Countryside	6
Rainy/Windy/Cold Weather	22
High Costs	6

Saskatchewan's market image in Montana can be summarized as follows:

- A high level of lack of awareness (41%) of Saskatchewan in general and more specifically what Saskatchewan offers in terms of tourism attractions and services for pleasure or business travel.
- As a destination for pleasure or business travel 50% of Montana residents gave Saskatchewan a favourable rating.
- Those Montana residents who visited Saskatchewan rate the province highly on its scenery, friendly people and a specific place or event. Of the aspects least liked, these Montana residents were most likely to dislike the weather and flat countryside.
- The most significant negative image which Saskatchewan has to overcome in the Montana marketplace is the perception of unfavourable weather.

3.0 POTENTIAL MARKET FOR TRAVEL TO SASKATCHEWAN

The previous two chapters of this report described a number of characteristics typical of the Montana out-of-state travel market and examined Saskatchewan's level of performance in the market in terms of market share and market image.

It was noted, for example, that Saskatchewan, in 1982, captured 2.8% (60,600 person-trips) of the out-of-state travel by Montana residents.

Montana residents are interested in a variety of pleasure travel activities such as rural sightseeing, urban sightseeing, visiting historical sites/museums, attending festivals and events and craft and art fairs. Saskatchewan can compete in the Montana market for rural and urban sightseeing, fishing, hunting, camping, etc.

Rural sightseeing has to be packaged with a variety of outdoor activities and other natural resources into a package which does not show Saskatchewan as all flat prairie, but a province with a diverse topography, friendly people and a relaxed atmosphere. Urban sightseeing should be packaged with specific attractions and events for the Montana market.

3.1 Long-Term Outlook for Growth in Montana's Travel Markets

Thorne, Stevenson & Kellogg estimate that per capita trips in Montana would continue to decline from 6.2% in 1981, to 5.86% in 1987. This would not, however, result in a decline in total person-trips. These would still increase 2.6% to about 5,004,000 in-state and out-of-state person-trips in 1987. The high forecast predicts an increase of 9.4% over 1982 levels for a total of 5,337,500 person-trips. These figures are based on trends in population, personal disposable income, and trips per capita.

3.2 Forecast of Potential Travel Market for Saskatchewan from Montana to 1987

If Saskatchewan maintained its market share of about 2.8% of Montana's out-of-state travel markets, Saskatchewan could expect travel by Montana residents to Saskatchewan to grow from the 60,600 person-trips in 1982, up to 66,300 person-trips in 1987, using the high scenario and up to 62,200 by 1987, using the low scenario.

NOTE: High scenario represents a 9.4% growth rate.
Low scenario represents a 2.6% growth rate.

The Montana survey conducted by Mid-Continent Research, Inc. in 1983, found that 25% of Montana residents were either "very" or "somewhat" likely to travel to Saskatchewan on a pleasure trip in the next year or two. This level of interest in travel to Saskatchewan was lower than the likelihood expressed by North Dakota or Minnesota residents.

TABLE 20

Percent of Montana, North Dakota, and Minnesota Residents Indicating Likelihood of Visit to Saskatchewan in the Next Year or Two

Level of Likelihood	Montana	North Dakota	Minnesota
Very Likely	8%	15%	9%
Somewhat Likely	17%	15%	19%
Total % Disposed to Travel to Saskatchewan	25%	30%	28%

3.3 Reasons for Likelihood of Montana Residents to Visit Saskatchewan

The 1983 market survey conducted by Mid-Continent Research, Inc., also examined the "reasons" that Montana residents stated they were either likely or not likely to visit Saskatchewan. The reasons given for probable travel to Saskatchewan by Montana residents were, in order of importance: to "explore new place/ see the scenery" and to "visit friends/relatives".

TABLE 21

Reasons Montana Residents are Likely to Travel
to Saskatchewan in the Next Year or Two
(All Mentions)

Reasons	Percent
Explore New Place/See the Scenery	10
Visit Friends/Relatives	5
"Passing Through"	2
Camping/Touring	2
Go Every Year	2
Other	7
Total	**28**

Montana residents who reported being unlikely to visit Saskatchewan felt this way for the following reasons: nothing to do there/rather go someplace else first; no interest in visiting Saskatchewan; no friends or relatives to visit there; and lack of money.

TABLE 22

Reasons Montana Residents are Not Likely to Travel
to Saskatchewan in the Next Year or Two
(Total Mentions)

Reasons	Percent
Rather Go Somewhere Else/Nothing to do There	25
No Interest	12
No Relatives/Friends	10
Money Problems	8
Lack of Knowledge About Saskatchewan	4
No Time/Too Busy	6
Too Old/Health Reasons	3
Too Far Away	7
Other	2
Total	**77**

In terms of those who reported that they were "not too likely" to visit Saskatchewan, only 4% stated that it was due to lack of knowledge. The predominant reasons, such as "nothing to do/rather go somewhere else" and "no interest in going there" are probably in all likelihood attributable to a lack of knowledge about Saskatchewan's tourism attributes and to no significant marketing/promotional efforts in the Montana marketplace.

3.4 Factors Most Likely to Influence Travel by Montana Residents to Saskatchewan

Table 23 shows the factors which would motivate Montana residents to travel to Saskatchewan in the next year or two. The main motivator would be for a good fishing or hunting experience.

TABLE 23

Factors Most Likely to Influence Travel to Saskatchewan by Montana Residents in Next Year or Two (Total Mentions)

Factor	Percent
If I Had Friends/Relatives to Visit	5
If Friends/Relatives Were Going	6
A Good Fishing or Hunting Experience	13
Good Priced Package Tour	2
More Specific Information	4
Special Event/Activity	5
Curiosity/Just to go There	6
Brochure/Advertising/Promotion	3
Someone's Recommendation	1
Extra Cash	11
If Remarkable Scenery was Available	2
Nothing	22
Other	13
Don't Know	14
Total	**107**

3.5 Potential Size of Markets for Specific Activities

Table 24 provides a breakdown of the potential size of the market in Montana for specific Saskatchewan activities. Table 24 shows that the promotion of a package of specific activities/attractions can be associated with influencing a greater influx of Montana visitors to Saskatchewan. Specific activities/attractions such as rural sightseeing, camping, fishing, wilderness canoeing and historical sites/museums, hunting, and urban sightseeing should be packaged and promoted to the sports fishing segment, the hunting segment and to the touring segment in the Montana market.

TABLE 24

Existing and Projected Growth to 1987 in the Montana Market for Selected Pleasure Travel Activities in Saskatchewan

Travel Activity	Montana Residents Interested in Activity	Size of Market in 1982 Person-Trips[1]	Existing Market Captured	Projected Maximum Market Available by 1987 for Sask.[2]	Increase
Rural Sightseeing	77%	30,300	50%	33,150	2,850
Historical Sites	88%	3,600	6%	3,940	340
Urban Sightseeing	73%	13,300	22%	14,550	1,250
Festivals/Events	56%	3,600	6%	3,940	340
Camping	64%	6,700	11%	7,330	630
Water Sports	42%	3,600	6%	3,940	340
Sporting Events	52%	6,700	11%	7,330	630
Musical Events	54%	-	-	-	-
Fishing	55%	3,600	6%	3,940	340
Hiking	39%	-	-	-	-
Craft/Art Fairs	40%	3,600	6%	3,940	340
Downhill Skiing	29%	-	-	-	-
Industrial Tours	21%	-	-	-	-
Cross-Country Skiing	16%	-	-	-	-
Sailing	10%	-	-	-	-
Snowmobiling	19%	-	-	-	-
Wilderness Canoeing	16%	-	-	-	-
Big Game Hunting	31%	3,600	6%	3,940	340
Game Bird Hunting	20%	-	-	-	-

[1]Based on 60,600 person-trips.
[2]Based on projected high scenario growth of 9.4%.

3.6 Characteristics of Montana Visitors

According to Thorne, Stevenson & Kellogg:

- Many travellers from Montana and surrounding states are in the middle age and income brackets. Data from the U.S. National Travel Survey show the greatest proportion of travellers from Montana, the Dakotas and Wyoming to be between 35 and 55 years old (31%). A considerable proportion, however, are either under 18 (23%) or over 55 (21%).

- The majority of travellers from these states (60%) also earn low- to mid-range incomes, i.e. between $10,000 and $20,000 per year (1977 U.S. dollars).

4.0 CONSIDERATIONS AND IMPLICATIONS FOR MARKETING AND PROMOTIONAL STRATEGIES

Previous chapters of this report have noted a number of important aspects of the Montana travel market for Saskatchewan. The primary reason why Montana residents visit Saskatchewan is for purposes of sightseeing.

Forecasts of the potential travel volumes to Saskatchewan from Montana found that there is likely to be a growth of 2.6% to 9.4% occurring in the Montana travel marketplace over the next several years and that marketing activities undertaken prior to 1987 should provide Saskatchewan with a reasonable opportunity to increase its share of the growing Montana travel market.

4.1 Improvements Required to Saskatchewan's Market Image in Montana

Montana generally sees Saskatchewan as a place for rural/urban sightseeing.

At the same time, as many as 41% of Montana residents have "no image" of Saskatchewan.

There is a need to create an image of Saskatchewan as a desirable place to vacation in on the basis of Saskatchwan's tourism resources and attractions for rural/urban sightseeing, fishing, hunting, camping, and other activities which are of interest to the Montana traveller.

4.2 Existing Awareness of Specific Attractions

Table 25 shows the awareness of selected Saskatchewan attractions in the Montana market.

TABLE 25

Awareness of Saskatchewan Places, Attractions and Events by Montana Residents

Place/Attraction/Event	Level of Awareness
Regina	77%
Saskatoon	75%
Moose Jaw	67%
Regina Royal Canadian Mounted Police Training Depot and Museum	43%
Pioneer Days, Saskatoon	40%
Churchill River	18%
Prince Albert National Park/ Waskesiu	48%
Moose Mountain Provincial Park/ Kenosee	14%
Grasslands	20%
Regina Buffalo Days Exhibition	27%
Cypress Hills Provincial Park	21%
Lake Diefenbaker	13%
Lac La Ronge Provincial Park	16%
Qu'Appelle Valley	8%
Fort Walsh National Historic Park	8%
Batoche	5%
None of These - Not Heard of Any	4%

The cities enjoy the highest level of awareness in Montana.

It is interesting to note that natural features for rural sightseeing, such as the Qu'Appelle Valley, have a low level of awareness. Historic sites such as Fort Walsh and Batoche also have a low level of awareness as well as provincial parks such as Moose Mountain and Lac La Ronge.

This would suggest that Saskatchewan's marketing/promotional activities focus first on creating a favourable or positive image of Saskatchewan as a desirable vacation place with a wide-range of topography and "things to do and see". The second marketing/promotional thrust should be on specific activities:

- urban sightseeing
- rural sightseeing
- fishing
- camping
- wilderness canoeing
- special major events/music festivals

4.3 Promotional Media for Encouraging Travel to Saskatchewan by Montana Residents

Table 26 shows the sources of ideas about places to go for pleasure travel as reported by Montana residents. As expected, word-of-month references from friends or relatives is the most dominant factor in terms of where people got their ideas for pleasure travel. Magazines and television followed in second and third order of importance.

TABLE 26

Source of Ideas About Places to Go

Source	Percent
Friends/Relatives	70
Newspapers	11
Magazines	25
Travel Agency/Travel Brochures	3
Television	16
Decide Myself/Our Own Ideas/What We Want to Do/Where We Want to Go	7
In the Mail	9
Radio	6
Chamber of Commerce/Travel Show/ Information Booth/Tours Through	3
Books/The Library/Encyclopedias	4
Automobile Club	-
Visit Relatives/Visit Family	-
Other Mentions	3
Don't Know	2

Tables 27, 28, and 29 illustrate the type of media Montana residents read or listen to.

TABLE 27

Daily Newspaper Montana Residents Read on a Regular Basis

Newspaper	Percent	City Size					Income				Sex	
		Under 5000	5 to 50M	50 to 100M	100 to 500M	500M Over	Under 20000	20000-29999	30000-39999	40000-Over	Men	Women
Billings Gazette	22	19%	15%	26%	92%	100%	25%	22%	12%	33%	19%	24%
The Missoulian	19	21%	20%	19%	-	-	21%	22%	24%	10%	22%	18%
Great Falls Tribune	18	16%	11%	47%	-	-	12%	18%	21%	30%	20%	17%
Bozeman Daily Chronicle	7	3%	12%	-	-	-	5%	7%	9%	7%	6%	7%
Montana Standard	6	3%	11%	-	-	-	7%	2%	9%	7%	5%	7%
Helena Independent Record	5	1%	10%	-	-	-	1%	5%	21%	3%	8%	4%
Wall Street Journal	3	4%	1%	7%	-	-	1%	-	3%	13%	5%	2%
Havre Daily News	3	1%	5%	-	-	-	1%	3%	-	7%	1%	4%
Miles City Star	3	3%	4%	-	-	-	2%	5%	3%	-	4%	3%
Spokesman Review	3	3%	3%	5%	-	-	-	3%	9%	3%	2%	3%
Ravalli Republic	2	7%	1%	-	-	-	2%	-	6%	3%	4%	2%
U.S.A. Today	+	-	-	-	-	50%	1%	-	-	-	-	1%
Other Mentions	17	23%	21%	5%	-	-	16%	13%	12%	23%	16%	18%
None - Don't Read a Daily Paper	13	20%	11%	9%	8%	-	16%	20%	-	7%	13%	13%

TABLE 28

Magazines Read Regularly by Montana Residents

Magazine	Percent
	41
Sports Illustrated	26
Readers Digest	17
Time	-
Maclean's	-
Chatelaine	15
National Geographic	9
Newsweek	5
Women's Magazines	5
Regional Magazines	9
Good Housekeeping	3
Home and Garden Magazines	6
Sports Magazines	7
McCall's	7
Better Homes and Gardens	6
General Interest Magazines	9
Ladies Home Journal	5
Business and Finance Magazines	5
People	8
Science Magazines	8
U.S. News & World Report	5
Trade, Technical and Professional Journals	1
Cosmopolitan	3
Family Circle	8
Redbook	4
Woman's Day	6
Outdoor Life	2
Life	4
Farming and Farm Life Magazines	3
Sports Afield	3
Field and Stream	1
Popular Mechanics	1
Farm Journal	-
The Farmer	1
Money	29
Other Magazines	15
None- Don't Read Any Magazines	

TABLE 29

Radio Stations Listened to Most Often by Montana Residents

Radio Station	Percent	City Size					Income				Sex	
		Under 5000	5 to 50M	50 to 100M	100 to 500M	500M Over	Under 20000	20000-29999	30000-39999	40000-Over	Men	Women
KMON - AM	4	4%	1%	14%	-	-	4%	5%	6%	7%	8%	2%
KGHL - AM	2	3%	-	5%	17%	-	2%	2%	3%	7%	2%	3%
KBOZ - AM	2	4%	3%	-	-	-	2%	3%	6%	-	1%	3%
KERR - AM	2	6%	1%	-	-	-	4%	2%	-	-	2%	2%
KJJR - AM	2	1%	3%	-	-	-	1%	2%	3%	-	-	3%
KEIN - AM	2	1%	-	7%	-	-	-	2%	6%	3%	1%	2%
KYLT - AM	2	-	2%	5%	-	-	1%	3%	3%	-	2%	1%
KBOW - AM	2	-	3%	-	-	-	2%	-	3%	3%	1%	2%
Other AM Stations	27	27%	30%	21%	17%	-	26%	32%	24%	27%	28%	26%
KQ92 - FM	4	7%	3%	-	-	-	4%	3%	-	3%	6%	3%
Y93 - FM	2	4%	-	2%	-	50%	1%	3%	-	3%	1%	3%
KYSS - FM	2	-	3%	2%	-	-	-	5%	-	3%	4%	1%
Other FM Stations	32	23%	36%	33%	33%	50%	37%	23%	32%	30%	25%	35%
Don't Know/It Varies	4	7%	3%	5%	-	-	5%	5%	-	3%	4%	4%
None - Don't Listen	12	11%	12%	7%	33%	-	10%	10%	15%	10%	13%	11%

4.4 Timing and Promotional Activities

Section 1.2.6 of Chapter 1 of this report, gave details of the summer trip planning characteristics of Montana residents. It was noted that January and March are important months for planning summer pleasure trips.

5.0 CONCLUSIONS

The following conclusions can be drawn about the Montana market for Saskatchewan, based on the data and analysis contained in this report.

5.1 Saskatchewan captures a relatively small portion of Montana's out-of-state travel. The main orientation of the Montana market to Saskatchewan is for rural and urban sightseeing. Other orientations of the Montana market to Saskatchewan are for camping, fishing and musical events.

5.2 The Montana market is now increasing and is expected to grow between 2.6% - 9.4% by 1987 over the 1982 level. The next three-year period should provide Saskatchewan with a good opportunity to increase its market share from the current 60,600 person-trips.

5.3 To penetrate the Montana market, Saskatchewan will have to upgrade its tourism plant and package rural/urban sightseeing opportunities, fishing, hunting, camping and other outdoor recreational opportunities as well as special festivals and events.

APPENDIX A
METHODOLOGY

THE SAMPLE

Information was required on the travel behaviour of residents of Montana and especially on those who travel 800 km. (500 miles) or more which is of sufficient distance to travel to Saskatchewan.

The study was concerned with trips taken by individuals 18 years of age or older, and data was collected on travel patterns of Montana residents for the past three years.

A disproportionate sampling procedure was designed to yield a sample of 250 completed interviews for metropolitan and rural Montana.

The Kish respondent selection system was used to select the proper household member. Six different versions of the Kish respondent selection system were utilized to insure randomness of sample.

To ensure representativeness of the sample, up to three dialing attempts at different times of day and on different days of the week, were made to complete an interview at a designated household. If, after three attempts, an interview could not be completed at a designated household, an alternate was substituted.

For results based on a sample of this size, with a 95% confidence level, the error is $\pm$3%.